

CONTINUIDAD Y RENOVACION DE LAS TRADICIONES VERNACULAS
EN EL AMBIENTE CARIBEÑO CONTEMPORANEO

Roberto Segre

Assessing the Preservation Needs of Paper-based Collections

EDUCATIONAL MATERIAL



CENCOR
CENTRO DE CONSERVACIÓN Y RESTAURACIÓN
P U E R T O R I C O

Assessing the Preservation Needs of Paper-based Collections – An online course

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The *Conservation Center for Art and Historic Artifacts* is a nonprofit, full-service facility providing conservation and preservation services since 1977. The CCAHA provides expertise and leadership in the preservation of cultural heritage through technical conservation and preservation services, as well as education programs.

The *Centro de Conservación y Restauración de Puerto Rico* is a private nonprofit regional conservation center that promotes the protection, management, and conservation of our shared cultural heritage in Puerto Rico and the Caribbean region through research, educational initiatives, training, and highly specialized technical and consultancy services.

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Assessing the Preservation Needs of Paper-based Collections

EDUCATIONAL MATERIAL



1. En equipo discutan los riesgos de su institución y de sus colecciones.
2. Usarán como se pueden preparar para emergencias.
3. Revisarán el Plan de Rollos de Emergencias y asignen roles a su equipo de mesa.

Miguelina

EMERGENCIAS

Objetivos, estrategias, y prioridades de colecciones y recursos humanos, tiempo, recursos, costo, y personas, y colecciones.

GAYLORD ARCHIVAL
Guide to
Collections Care

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Acknowledgements

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INTRODUCTION

This toolkit, supported by lectures and exercises, provides a process for identifying risks to cultural heritage collections and creating a long-term preservation plan. The focus of the toolkit is paper-based collections (documents, books, artwork on paper, and photographs), but many of the topics covered are applicable to all types of cultural heritage collections found in museums, libraries, archives, and even personal collections. Content in the toolkit is organized into modules that cover all of the basic aspects of preservation: planning, the building, the environment, storage, collections care, and emergency management.

The intended audience of this content is people working hands-on with collections that are accessible to the public. For those who are interested in learning about the preservation of their personal collections, see the [Caring for Family Treasures](#) guide that was compiled for this project.



MODULE 1

Introduction to Preservation Needs Assessment

This module explains the fundamentals of a preservation needs assessment, an essential tool for protecting paper-based collections. It begins by addressing key questions such as: *What is a preservation assessment, and why is it so important to conduct one?* The module also highlights who should be involved in this process, emphasizing the value of collaboration among professionals from different fields.

You will also learn about the 10 agents of deterioration that threaten collections, from environmental factors to improper handling, and explore how these agents directly affect preservation. Understanding this relationship is crucial for identifying risks, setting priorities, and developing effective strategies to ensure the long-term care of collections.



KEY QUESTIONS

- What is preservation assessment?
- Why is it important?
- Who should be involved in preservation assessment?
- What are the 10 agents of deterioration?
- How do the agents relate to preservation assessment?



STEP 1: WATCH

Watch the video, [Introduction to Preservation Needs Assessment](#) from CCAHA and CENCOR.



STEP 2: READ

- Read the technical leaflet, [A Preventive Conservation Primer](#), from CCAHA.
- Read Stefan Michalski's document, [Basic Collection Preservation Strategies](#), from *Running a Museum: A Practical Handbook*.
- Review the [sample report](#) to familiarize yourself with the content and format of a preservation needs assessment.



STEP 3: INVESTIGATE

- Download the Preservation Needs Assessment Pre-Survey Questionnaire. For each module, you will complete one section of the questionnaire.
- [Download the Questionnaire](#)
- Once you have downloaded the document, **complete Section I: Introduction**



STEP 4 (OPTIONAL): DIVE DEEPER

- Look at the slides from [Preventive Conservation Basics](#).
- Read pages 24-48 of [A Guide to Risk Management of Cultural Heritage](#), from ICCROM.
- Read [The Conservation Assessment: A proposed model for evaluating museum environmental management needs](#) from the Getty Conservation Institute.



MODULE 1 BIBLIOGRAPHY

Avrami, Erica, Kathleen Dardes, Marta De la Torre, Samuel Y. Harris, Michael Henry, and Wendy Claire Jessup. *The Conservation Assessment: A Proposed Model for Evaluating Museum Environmental Management Needs*. Los Angeles, California: Getty Conservation Institute, 1999. https://www.getty.edu/conservation/publications_resources/pdf_publications/pdf/assessmodeleng.pdf.

Conservation Center for Art & Historic Artifacts. "A Preventive Conservation Primer," Updated 2023. https://ccaha.org/sites/default/files/attachments/2022-07/2022_A%20Preventive%20Conservation%20Primer.pdf.

Michalski, Stefan. "Care and Preservation of Collections." In *Running a Museum: A Practical Handbook*. Paris: International Council of Museums, ICOM, 2004.

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Pedersoli Jr., Jose Luiz, Catherine Antomarchi, and Stefan Michalski. *A Guide to Risk Management of Cultural Heritage*. ICCROM, Canadian Conservation Institute, 2016. https://www.iccrom.org/sites/default/files/Guide-to-Risk-Management_English.pdf.



MODULE 2

Planning and Policies

This module focuses on the administrative aspects of preservation. It examines what it means to manage preservation strategically and how proper planning can make a significant difference in the long-term care of collections.

The module addresses key questions such as: *What is preservation management, and how is it integrated into the overall operations of an institution?* It also presents examples of policies in museums and libraries that should be considered to provide a solid foundation for preservation efforts. Finally, it explores practical strategies for budgeting preservation projects, taking into account the available resources and the need for long-term sustainability.



KEY QUESTIONS

- What is preservation administration?
- What are the essential policies for preservation?
- What are some strategies for budgeting for preservation projects?



STEP 1: WATCH

Watch the video, [Planning & Policies](#), from CCAHA and CENCOR.



STEP 2: READ

- Read Nicola Ladkin's document, [Collections Management](#), from *Running a Museum: A Practical Handbook*.
- Look at several Collections Management Policies to familiarize yourself with the format and content of a public facing CMP

The Hispanic Museum and Library [Collections Management Policy](#)
The Museum of the City of New York [Collections Policies](#)

- Read CCAHA's [Budgeting for Collections Care](#)



STEP 3: INVESTIGATE

Complete **Section II: Planning & Policies** of the [Pre-Survey Questionnaire](#).



STEP 4 (OPTIONAL): DEEP DIVE

- Click through CCAHA's [Collections Management Policy Toolkit](#) to familiarize yourself with the tool. Pay close attention to the "About" sections.



MODULE 2 BIBLIOGRAPHY

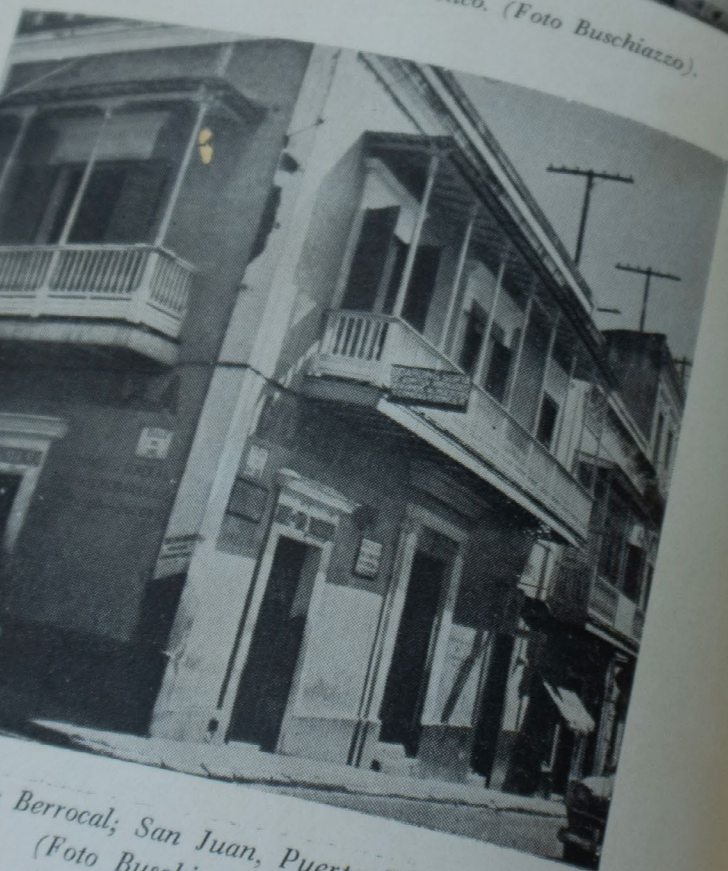
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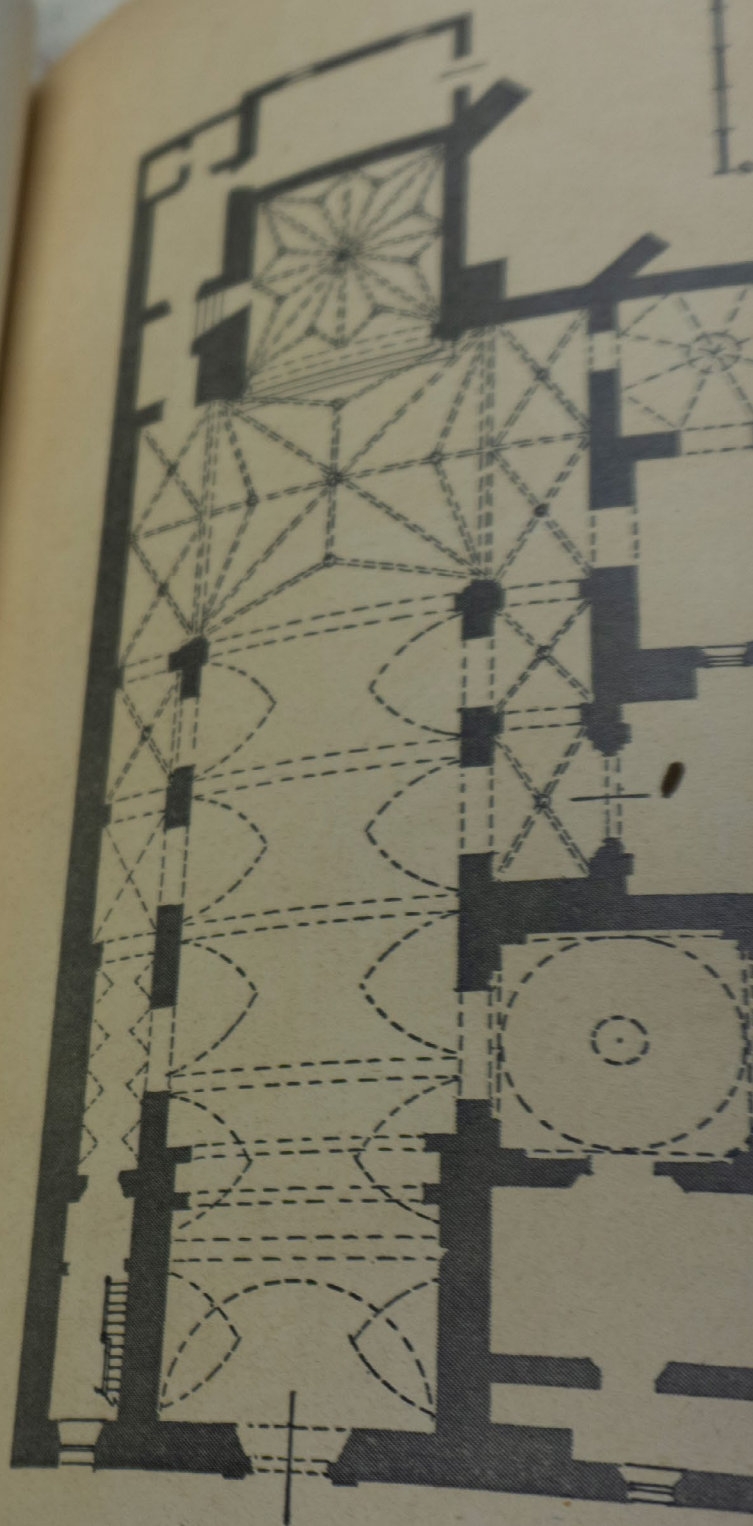
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Arzobispado; San Juan, Puerto Rico. (Foto Buschiazzo).



Berrocal; San Juan, Puerto Rico. (Foto Buschiazzo).



MODULE 3

The Building

Understanding the building is essential for the preservation of collections. In this context, the term building refers not only to its physical structure but also to all the elements that affect the environment in which cultural materials are housed.

The module explains the concept of the building envelope, which serves as the barrier between the interior and exterior, and examines how it interacts with the HVAC system. Understanding how these components work together is essential for maintaining a stable and suitable environment for collections. It also discusses best, good, and acceptable conditions for collection spaces, taking into account factors such as temperature, humidity, and air circulation.



KEY QUESTIONS

- What do we mean by 'building'?
- What is the building envelope?
- What are mechanical systems?
- How do the building envelope and mechanical systems work together to create a collections environment?
- What are the “best” conditions for collections spaces? What are good and better conditions?



STEP 1: WATCH

Watch the video, [The Building](#), from CCAHA and CENCOR.



STEP 2: READ

- Read the [Museum Buildings: Characterizations](#) section of The Conservation Assessment from the Getty Conservation Institute.
- Download and browse ICCROM's [Re-Org workbook](#) to familiarize yourself with the program.



STEP 3: INVESTIGATE

Complete Section III: Building of the [Pre-Survey Questionnaire](#).



STEP 4 (OPRIONAL): DIG DEEPER

- Read [Design Considerations for Preventive Conservation in New Heritage Collection Facilities](#) from the Canadian Conservation Institute.



MODULE 3 BIBLIOGRAPHY

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Module 3: Building. YouTube video, 2024. <https://www.youtube.com/watch?v=mqc0NAI2vo8>.



MODULE 4

The Collections Environment

This module focuses on the environmental conditions surrounding collections and their impact on preservation. It discusses how environmental factors such as temperature, relative humidity, and the dew point influence the deterioration and/or stability of materials.

The module also highlights key priorities to consider when developing environmental policies, aiming to balance ideal conditions with available resources. A central topic is mold: what causes it, how to prevent its growth, how to recognize it early, and what actions to take if it appears.



KEY QUESTIONS

- How do temperature, relative humidity, and dew point affect collections?
- How do I prioritize environmental policies?
- What causes mold? How can I prevent it? How can I identify it?



STEP 1: WATCH

Watch the video, [The Environment](#), from CCAHA and CENCOR.



STEP 2: READ

- Read Chapter 2 of [Environmental management for collections: alternative conservation strategies for hot and humid climates](#) from the Getty Conservation Institute.
- Watch the [Collections Care Basics: Mold!](#) from Connecting to Collections Care.



STEP 3: INVESTIGATE

Complete Section IV: Environment of the [Pre-Survey Questionnaire](#).



STEP 4 (OPTIONAL): DIG DEEPER

- Watch [De-Mystifying Environmental Monitoring](#) from Connecting to Collections Care.



MODULE 4 BIBLIOGRAPHY

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Module 4: Environment. YouTube video, 2024. <https://www.youtube.com/watch?v=0wA72n4pvG0>.



MODULE 5

Collections Storage

Proper storage is essential for the long-term preservation of collections. This module explains the elements that must be considered to achieve appropriate storage and why it is important for preventing physical, chemical, and biological damage to objects.

The module discusses how storage furniture can positively or negatively affect preservation, depending on their materials, design, and placement. It also reflects on how storage conditions, including space, accessibility, and organization, directly impact the integrity of collections. Finally, the module presents acceptable, good, and optimal storage practices, providing tools and criteria that allow institutions to improve conditions, even with limited resources.



KEY QUESTIONS

- What is collections storage? Why is it important?
- What does effective collections furniture do?
- What does effective housing do?
- Why are the materials that make up furniture and housings important?
- What are some good, better, and best ways to approach storage?



STEP 1: WATCH

Watch the video, [Collections Storage](#), from CCAHA and CENCOR.



STEP 2: READ

- Do a more thorough read of ICCROM's [Re-Org workbook](#)



STEP 3: INVESTIGATE

Complete Section VI: Storage of the [Pre-Survey Questionnaire](#).



STEP 4 (OPTIONAL): DIG DEEPER

- Watch [Choosing and Using Safe Materials for Collection Housing](#) from Connecting to Collections Care (Spanish captions available).
- Review CCAHA's [Preservation Glossary](#).
- Look at the slides from [Creative Housing Solutions for Paper-Based Collections](#).



MODULE 5 BIBLIOGRAPHY

Choosing and Using Safe Materials for Collection Housing. YouTube video. Connecting to Collections Care, 2024. <https://www.youtube.com/watch?v=mXwK00fLf2M>.

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Lambert, Simon and Canadian Conservation Institute. *Re-Org: A Method to Reorganize Museum Storage*. Roma: ICCROM, 2017. <https://www.iccrom.org/publication/re-org-method-reorganize-museum-storage>.



MODULE 6

Collections Care

This module focuses on specific actions for the care of collections, with particular attention to identifying priorities, managing risks, and ensuring long-term sustainability. It also addresses the condition assessment of objects, a key step for making informed decisions about interventions and future preservation needs.

Another topic is risk management for objects on display, considering how to protect them while still allowing public access. Finally, the module introduces sustainable digitization, exploring how it can support physical preservation, enhance access, and ensure the long-term continuity of digital collections.



KEY QUESTIONS

- What is a preservation priority and why is it important?
- How is condition determined?
- How does one manage risk to collections on display?
- What is a sustainable digitization program?



STEP 1: WATCH

Watch the video, [Collections Care](#), from CCAHA and CENCOR.



STEP 2: READ

- Review the [Illustrated Glossary of Paper Conservation: Damages and Treatments](#) from Silvana Bojanoski.
- Review slides from [Identifying Conservation Needs While Processing Collections](#).



STEP 3: INVESTIGATE

Complete **Section VI: Collections Care** of the [Pre-Survey Questionnaire](#).



STEP 4 (OPTIONAL): DIG DEEPER

- Watch [Basic Condition Reporting](#) from Connecting to Collections Care.
- Look at the slides from [Creative Housing Solutions for Paper-Based Collections](#).



MODULE 6 BIBLIOGRAPHY

Bojanoski, Silvana, and Márcia Almada. 2021. *The Illustrated Glossary of Conservation and Restoration of Works on Paper: Deteriorations and Treatments*. Edited by Fino Traço Editora. 1st ed. <https://finotracoeditora.files.wordpress.com/2022/06/glosario-ilustrado-es.pdf>.

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Module 6: Collections Care. YouTube video, 2024. <https://www.youtube.com/watch?v=eljizQAQRSg>.

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MODULE 7

Emergency Management

Preparing for emergency situations is essential to protect collections from potential risks. The module begins by highlighting what it means to ensure the safety of both the physical environment and the objects, and how various protection systems, such as fire extinguishers and smoke detectors play a key role. It presents the types of extinguishers and detection systems available, evaluating which is the most appropriate based on the specific characteristics of each collection and space.

Emphasis is also placed on having a clear and well-structured emergency plan, enabling quick and efficient action in the event of an incident. Key elements to consider when developing such a plan are discussed, from risk assessment to response and recovery protocols.



KEY QUESTIONS

- What is building and collection security?
- What are the different types of fire suppression and detection?
- Which is best for my collection?
- Why is emergency planning important?
- What is an effective emergency management program?



STEP 1: WATCH

Watch the video, [Emergency Management](#), from CCAHA and CENCOR.



STEP 2: READ

- Read Chapter 1 of the Getty's [Building an Emergency Plan: a guide for museums and other cultural institutions](#) and skim the rest of the guide
- Choose one set of wet salvage hands on videos to watch:

ArchiRed

[Salvamento de Libros y Papel](#)

State Library Queensland (auto translated captions available):

[Dealing with Disaster Part I](#)

[Dealing with Disaster Part II](#)

Heritage Preservation (auto translated captions available):

[Field Guide to Emergency Response](#)

AIC & FAIC (auto translated captions available):

[Wet Salvage](#)



STEP 3: INVESTIGATE

Complete Section VII: Emergency Management of the [Pre-Survey Questionnaire](#).



STEP 4 (OPTIONAL): DIG DEEPER

- Read [First Aid to Cultural Heritage in Times of Crisis](#) from ICCROM



MODULE 7 BIBLIOGRAPHY

Dealing with Disaster Part One: How to Recover a Flood-Damaged Collection. YouTube video. Dealing with Disaster, 2018. <https://www.youtube.com/watch?v=AfFke8fIOfw>.

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Webinar #8: Salvamento de Libros y Papel. YouTube video. Prevencion y Repuesta Ante Emergencias, 2019. <https://www.youtube.com/watch?v=MAx035v1u0Q>.

Wet Salvage Series, 2023. <https://www.youtube.com/watch?v=6x-t7OzqZlw>.

SELF-ASSESSMENT

Once you have completed the Modules and the corresponding sections of the Pre-Survey Questionnaire, organize your findings and recommendations using the [Preservation Needs Assessment Report Template](#).

TAKE ACTION

Grants

For many organizations, a Preservation Needs Assessment (PNA) Report is a useful tool for identifying potential grant projects. Your report may also be used as a supporting document in grant applications. CCAHA's Director of Business Development, Daphne Mayer, is available to provide guidance about resources and fundraising for your collection care needs. You can contact her at dmayer@ccaha.org with any questions you may have or to schedule a one-on-one meeting to discuss your collection. If you decide to pursue a funding opportunity that involves CCAHA's services such as conservation treatment or housing, assessments/surveys, digitization, or training workshops as part of the project, Daphne can also help with the application process..

Advocacy & Fundraising

PNA Reports may also be used as an advocacy tool with board members, leadership staff, and potential programming partners or as a fundraising tool with potential donors.

Project & Preservation Planning

The recommendations in this report can be used to identify and plan for discrete preservation projects, and the full report can be used as a framework for a long-range preservation plan. A long-range preservation plan is a holistic set of guidelines catered to an institution's collections and capacity. Like a strategic plan for collections care, this document sets a framework for preservation goals, laying a roadmap of action items for several years.





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